Module 7

Chapter 1

Requesting Training

Chapter Overview

Introduction

This chapter explains the processes related to requesting training. It guides you through the steps to complete the **Training Request Form** (TRF) and route it to the next approving official/office. The TRF will serve as a record of the request and can be printed at any level.

Chapter Contents

See Also

In this Module:
- Overview
  - Continued Service Agreement (CSA)
  - Roles and Responsibilities
- Chapter 4, Training Completions and Evaluations
  - Recording Completed Training in HR

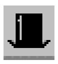
Continued on next page

Completing the Training Request Form

Purpose

This section will guide you through the process for completing the Training Request Form (TFR).

Who Has Access



Components will determine the level of access to HR-Training. Employees may submit their own TRF to their manager/supervisor if they have been granted access to HR-Training by their Component. Components will also determine who the final approved TRF is routed to for information purposes, such as the initiator of the action or the supervisor.

Before You Begin

- You must be in an HR-Training Secure User view to access employee names to populate the TRF, to process actions in the Workflow Inbox, and to print DD Forms 1556.
- Use the TRF to submit a request for enrollment to request training at a future date. The TRF is also the audit trail for approval of training and may be used as an invoice.
- Personnel data in the TRF auto-populates some of the data fields in the DD Form 1556. Data in the TRF does not flow and is only a tool.
- The TRF is available for individual requests only; however, you can easily make additional copies following the procedure in this chapter.
- If you do not complete the TRF, you can send it to your Workflow Inbox and return to it at a later time.
- A TRF is not required if you want to record an employee's self-development courses, or those completed at another agency.
- HR-Training does not have a Routing List like the RPA. A specific person's name from the LOV must be selected for routing purposes.
- Normally, the HR-Training Mgr/Supv or the HR-Training Org Trng Monitor will complete the TRF. In some cases, it may be completed by the HR-Training Personnelist if that office is centrally contracting or conducting the Event.
- Employees can only route their TRFs, approval status buttons are grayed out. The same person cannot create and approve the TRF.

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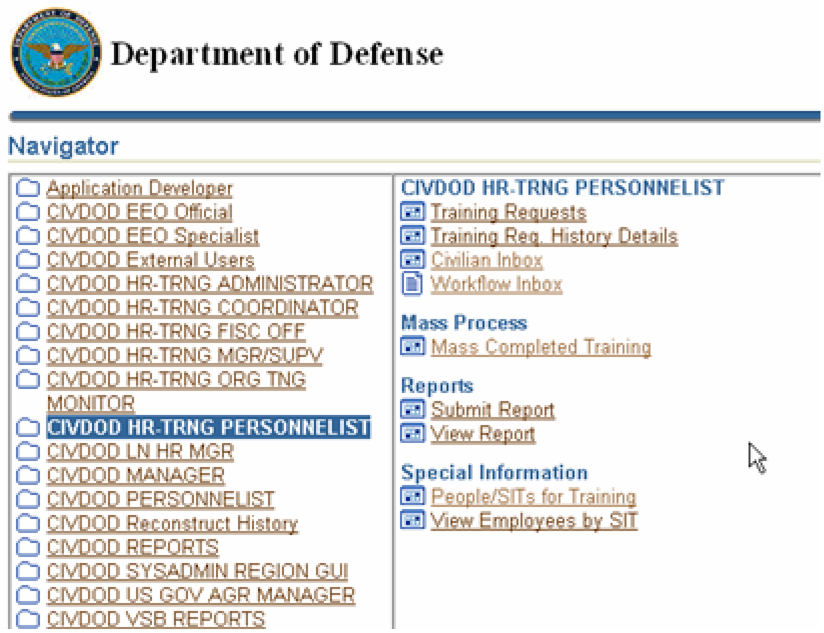
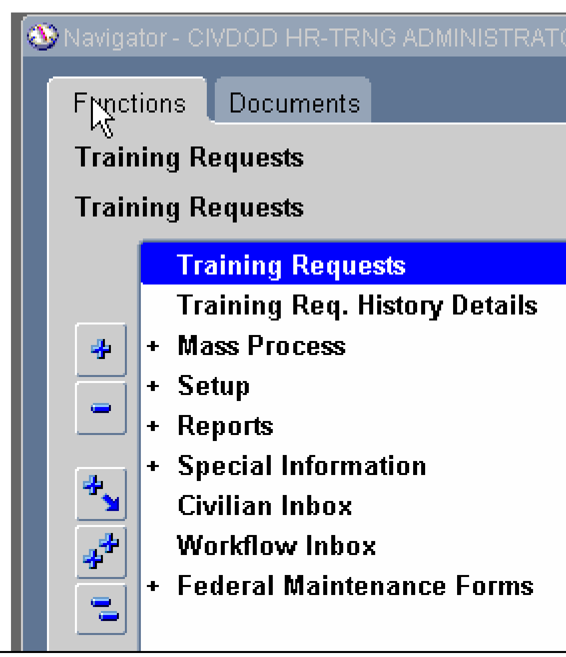
Completing the Training Request Form, Continued

Completing the Training Request Form

Step	Action
1	Click the responsibility that you have been assigned by your Component on the **Responsibilities** window. Click the **<OK>** button.  **Note:** See Roles and Responsibilities (Definitions and Access) in Module Overview.
2	The **Navigation List** opens. Click ***Training Requests*** and click **<Open>**. 

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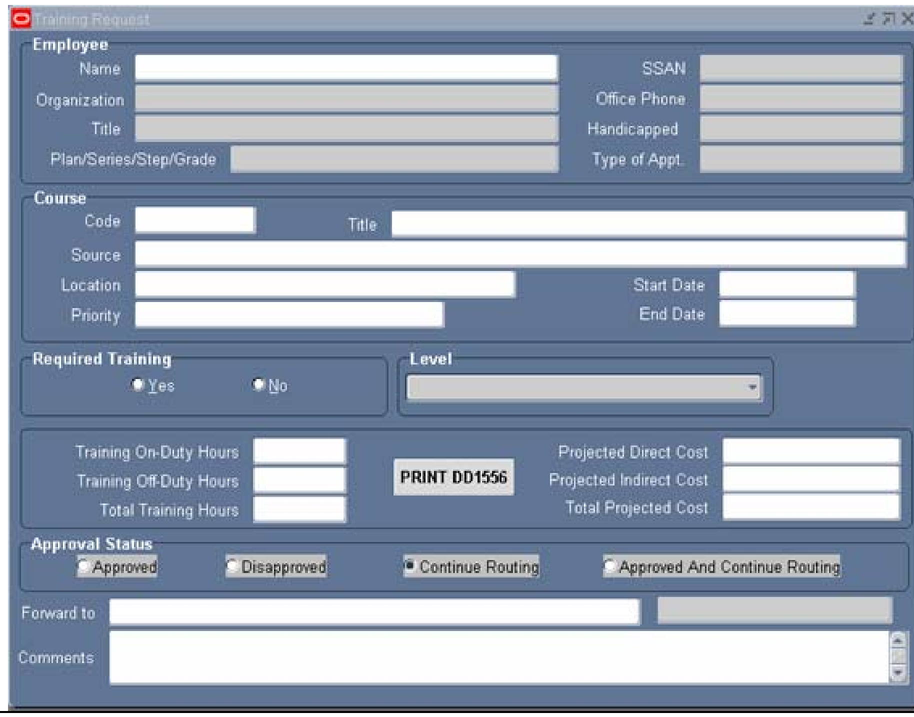
Completing the Training Request Form, Continued

Completing the Training Request Form (continued)

Step	Action
3	The **Training Request Form** window opens. 
4	Click your cursor in each of the following data fields to complete

Data Field	Description/Action
Employee Region:	
Name	Type using upper and lower case or select from the LOV on the Toolbar. The NAME field is a required field. The **SSAN, Organization**, and the remainder of the Employee Region will auto-populate from the HR database.
Course Region:	
Code	The OPM Training Type Code may be entered here.
Title	There is no course catalog to select from. This is a free form text field that allows the course Title to be entered in this location.

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Completing the Training Request Form, Continued

Completing the Training Request Form (continued)

Step	Action
4 (contd)	(nested table below)

Data Field/Region	Description/Action
Course Region: (contd)	
Source	Type in the code (e.g., G for National Guard, 4 for Private Vendor, etc) or select from an attached List of Values.
Location	Type in the location of the training or select from an attached List of Values.
Priority	Type the number 1, 2, 3, 9 (unknown) or select from an attached List of Values.
Start Date	Type in the start date of the training.
End Date	Type in the end date of the training.
Required Training	Click the radio button for 'Yes' or 'No'. You should also update the HR Required Training if this is one of your Component's business rules.
Level	Select the level of the person submitting the TRF from the drop-down menu, e.g., Employee, Supervisor, Training Monitor. The level is preset on the form to complete the signature blocks of the approving officials.
Training On-Duty Hours	Type in the total duty hours.
Training Off-Duty Hours	Type in the total off-duty hours.

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Completing the Training Request Form, Continued

Completing the Training Request Form (continued)

<table>
<tr><th>Step</th><th colspan="2">Action</th></tr>
<tr><td rowspan="8">4
(contd)</td><td>Data Field/Region</td><td>Description/Action</td></tr>
<tr><td>Total Training Hours</td><td>The Total Training Hours auto-calculate after on-duty and off duty hours are entered.</td></tr>
<tr><td>Projected Direct Cost</td><td>Type in the Projected Direct Cost (tuition and fees).</td></tr>
<tr><td>Projected Indirect Cost</td><td>Type in the Projected Indirect Cost (travel and per diem).</td></tr>
<tr><td>Total Projected Cost</td><td>The Total Projected Cost will auto-calculate.</td></tr>
<tr><td>Approval Status Region:</td><td>Click one of the following buttons:

Note: All selections to which you do not have access will be grayed out.</td></tr>
<tr><td>Approved</td><td>This action allows the HR Training Administrator to complete the registration process. Components can determine their specific policy.</td></tr>
<tr><td>Disapproved</td><td>This action stops the workflow process and sends a disapproved notification to the Civilian Inbox of the requestor.</td></tr>
</table>

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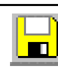
Completing the Training Request Form, Continued

Completing the Training Request Form (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4
(contd)</td><td>
<table>
<tr><th>Approval Status Region: (contd)</th><th></th></tr>
<tr><td>Continue Routing</td><td>Selection of this button allows the TRF to be changed or to be routed.</td></tr>
<tr><td>Approved and Continue Routing</td><td>Selection of this button documents an approval level but does not stop the workflow process. A notification will flow to the requestor that the TRF is approved.</td></tr>
<tr><td>Forward to</td><td>Click the LOV to select the name of the next person to access the TRF.</td></tr>
<tr><td>Comments</td><td>Type in comments up to 4 lines or 2000 characters.</td></tr>
</table>
</td></tr>
<tr><td>5</td><td>Click Save  on the Toolbar. The TRF will go to the inbox of the person “Forwarded To.” The Message Bar at the bottom of the window will indicate the status of the TRF, “Transaction complete. 1 records applied and saved.”</td></tr>
<tr><td>6</td><td>Continue routing the TRF until all approvals are received.</td></tr>
</table>

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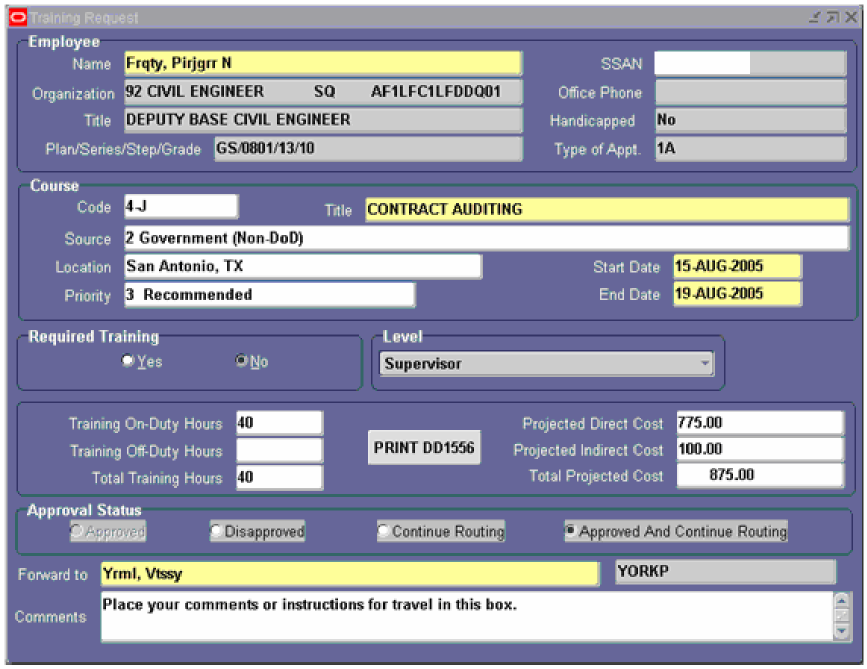
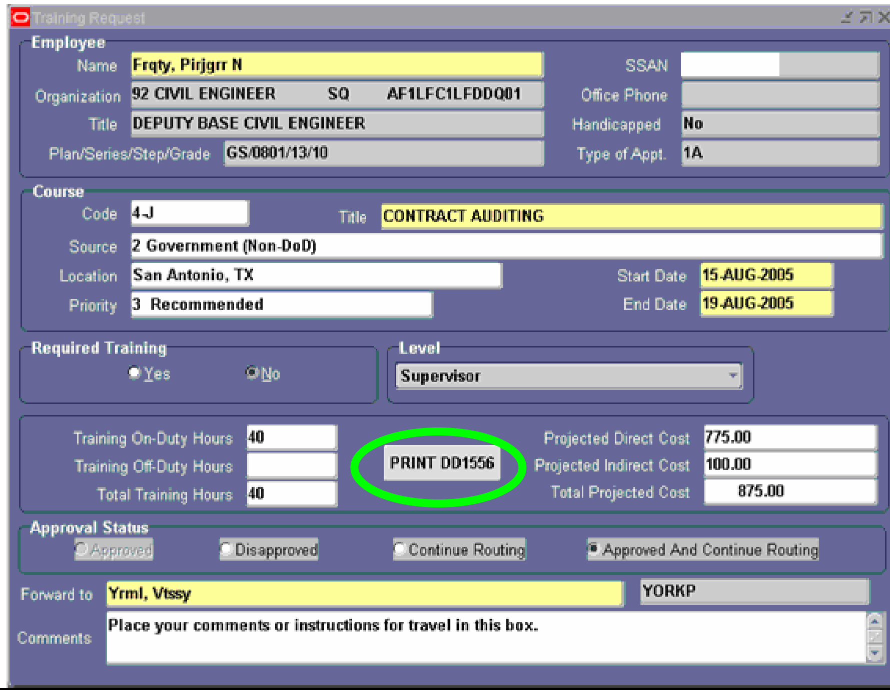
Completing the Training Request Form, Continued

Completing the Training Request Form (continued)

Step	Action
6 (contd)	**Example of completed TRF:** 
7	The TRF is forwarded to the Workflow Inbox of the person designated in the **Forward to** data field. The **Print DD1556** button will allow the form to be printed at any stage of the process.

Printing the Training Request Form

Printing the TRF

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>To print the TRF, click the Print DD1556 button.

</td></tr>
<tr><td>2</td><td>A NOTE is displayed saying “REPORT SUBMITTED. CONCURRENT REQUEST ID IS 9999999”. The actual concurrent request ID will be displayed in place of 9999999. (Record this number for viewing the concurrent process.)</td></tr>
<tr><td>3</td><td>To view the progress of the concurrent process click View/Requests from the menu bar. Then click FIND. Enter the process number to locate the status.</td></tr>
<tr><td>4</td><td>Meanwhile, the form DD 1556 will print automatically to the user’s default printer.</td></tr>
<tr><td>5</td><td>Exit the window and return to the Navigation List.</td></tr>
</table>

Completing Additional Training Request Forms

Completing Additional Training Request Forms

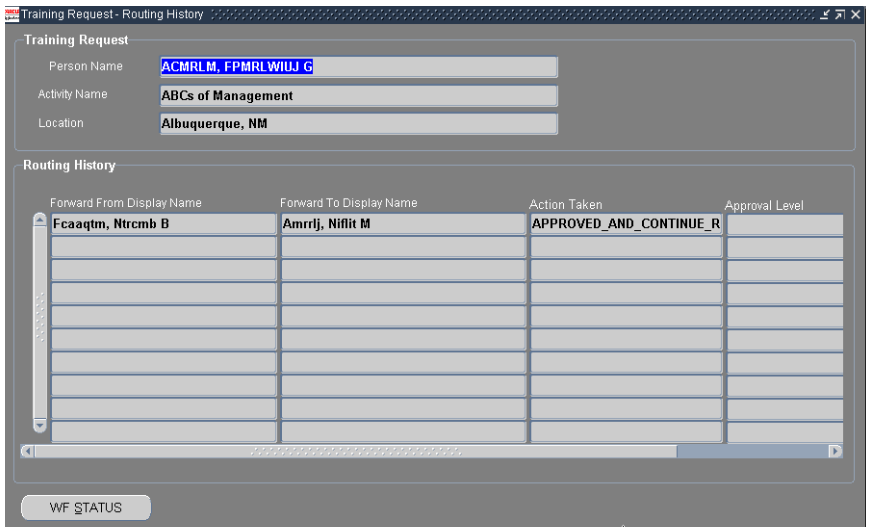
Follow this procedure with the TRF open that you wish to copy and add new names or if you wish to use the same name and add new course titles:

Step	Action
1	Select **Training Request Form** from the Navigation menu.
2	A blank Training Request Form will open.
3	With your cursor in the ***Name*** data field, select the employee name from LOV. The remaining data in the **Employee** Region auto-populates.
4	Complete the form as previously described. The fields are open and data can be entered without the requirement of a course catalog. Select items from the LOVs when they are available.
5	Complete the **Level, Approval Status** and person to **Forward to**.
6	**Save** the request.
7	To complete additional requests for the same course, simply place your cursor in the ellipses/LOV of the name block and select another name.
8	Or to complete additional requests for the same person, simply place your cursor in the **Course Title** block and type in the new course information.
9	**Save** the new request then repeat the process for each person or new course.

Viewing Training Request Routing History

Viewing the Routing History

Step	Action
1	From the Navigation menu select ***Training Req. History Details*** then **<Open>**.
2	The **Training Request Routing History** window will open. With your cursor in the ***Person Name*** data field, press F11. Type in the employee name or the first few letters of the last name, the % sign, then press CTRL + F11 or **Query by Example** then **Run**.



Data Field	Description
Forward From Display Name	This is the person who initiated the TRF.
Forward To Display Name	This is the person who the TRF was routed to.
Action Taken	Approved, Disapproved, etc.
Approval Level	These are the Levels on the TRF.
Date Notification Sent	A time stamp is included with the time of day.

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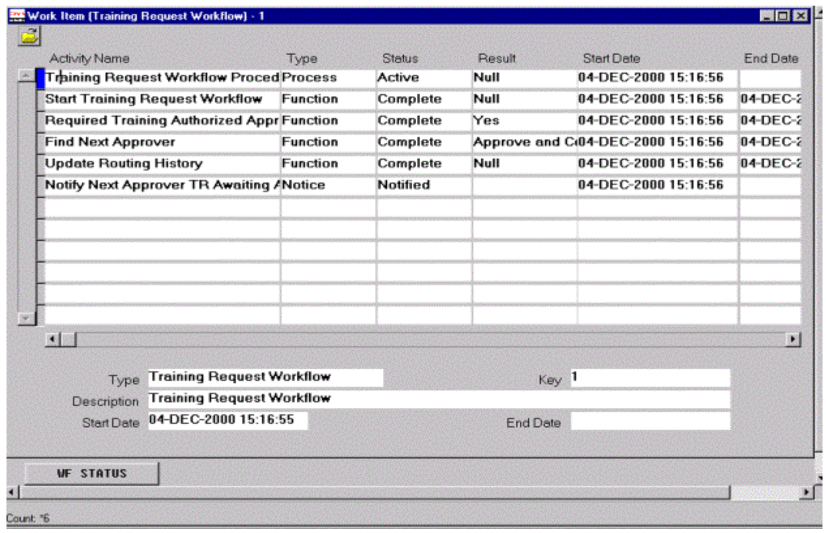
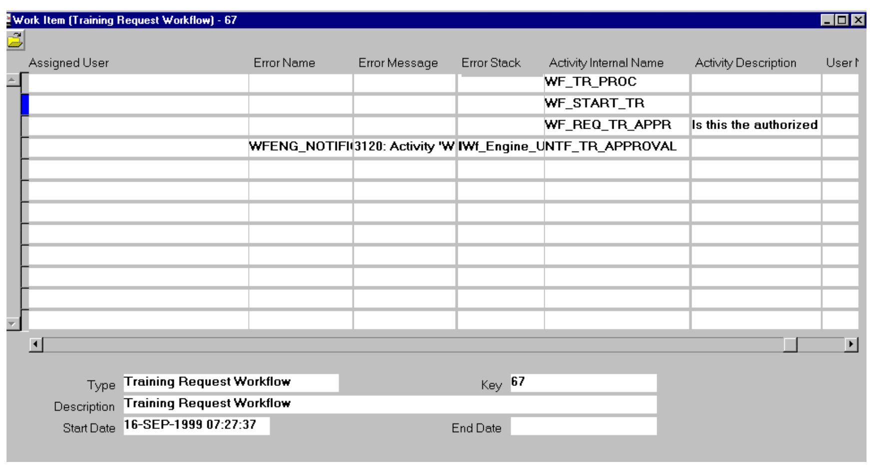
Viewing Training Request Routing History, Continued

Viewing the Routing History (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>Click <WF STATUS>. The Work Item (Training Request Workflow) window opens. As the button indicates, this gives you the status of your workflow processes.


Use the bottom scroll button to view the second half of window:


</td></tr>
</table>

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Viewing Training Request Routing History, Continued

Viewing the Routing History (continued)

Step	Action
4 (contd)	The Data Fields and Description from the Work Item Training Request Workflow Window are listed below:

Data Fields	Description
Activity Name	Identifies the step in the workflow process.
Type	Identifies whether it is a Process, Function, or a Notice
Status	Identifies whether or not the TRF is Active, Completed, etc.
Result	Yes, Null, Approve, etc.
Start Date	Self-explanatory
End Date	Self-explanatory
Assigned User	This is your name.
Error Name	*This field is not used by DoD.*
Error Message	*This field is not used by DoD.*
Error Stack	*This field is not used by DoD.*
Activity Internal Name	This is the name of the System Quick Code.
Activity Description	Self-explanatory
User Name	This is your log-in name.

Processing HR-Training Actions in the WorkFlow Inbox

Purpose

This procedure guides you through the steps for accessing and moving HR-Training actions in the Workflow Inbox.

Definition

The **Workflow Inbox** opens notifications of actions initiated by you or routed to you. Everyone who has an inbox (e.g., Supervisor, Training Official, Authorizing Official, Training Monitors, Training Managers, and Training Personnelist) can process training actions.

As Training Requests are submitted, they will be forwarded to the appropriate **Workflow Inbox** to await further action.

Who Can Access the Workflow Inbox

Managers/supervisors, HR-Training Personnelist, Training Coordinators, and Training Monitors in the organization assigned to a **Workflow Inbox** with an HR-Training responsibility. There is no specific routing list so one must know who they are forwarding the request to.

Before You Begin

- Before a Training Request action will display in your **Workflow Inbox**, a completed Training Request Form (TRF) must have been completed and forwarded by an employee, manager/supervisor, Training Monitor or Training Coordinator to you.
- To process a TRF in your **Workflow Inbox**, you must have an HR-Training Secure User View. No names display on the LOV if you do not have an HR-Training Secure View.
- The TRF auto-populates the employee portion of the DD Form 1556. You must complete the TRF if you want to print the complete form.
- Training Request Forms can be accessed from the Workflow Inbox; however, you must access the Inbox through a trainer role (HR-Training Administrator, Manager, Personnelist, Monitor, or Coordinator) before you can process actions. If you are using any other role or responsibility and try to process a TRF, you will get an error message.
- If you forward the TRF, it will not display in your inbox after you close and reopen it.

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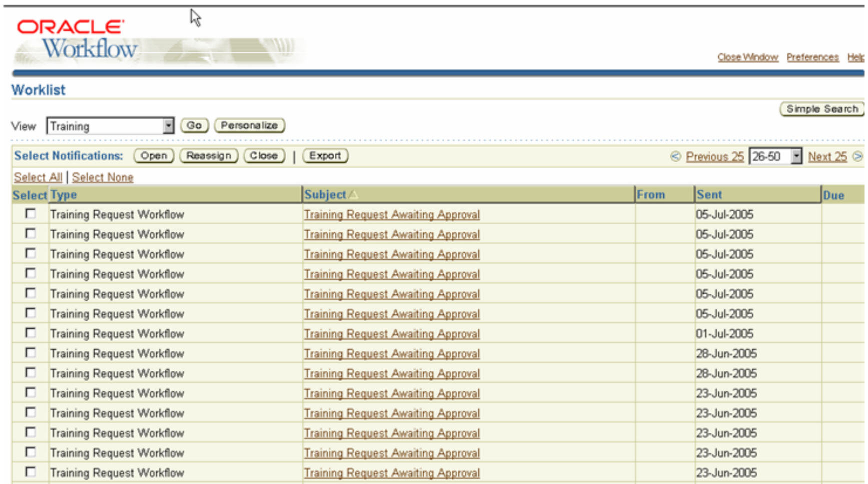
Processing HR-Training Actions in the WorkFlow Inbox,
Continued

Accessing the Workflow Inbox

Step	Action
1	Ensure you are in the proper training role or responsibility. Select the Navigation Path <*Workflow Inbox*> then <**Open**>.
2	The **Notifications Summary** window opens. All actions sent to you (training and otherwise) display that relate to your user roles and responsibilities. 

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Processing HR-Training Actions in the WorkFlow Inbox,
Continued

Accessing the Workflow Inbox (continued)

Step	Action
2 (contd)	

Data Fields/Buttons	Description/Action
Priority	This is a system generated number (not the DoD course priority).
Due Date	This is not applicable to the HR-Training actions.
To	This field auto-populates based on information from the request.
Subject	This field auto-populates based on information from the request.
Comment	This field is for additional information on the request may be added in this 2000-character field.
Date Sent	This date auto-populates based on information from the request.
Date Closed	This date auto-populates when action is complete; however, it will not be visible until you deselect the *Query Only Open Notifications* Checkbox.
Notification ID	This is a system generated number.
Status	This is initialized when “Open” is selected.
Attributes 1-20	Additional columns are available for local use.
Message Block	This block gives brief details of the action to be worked.
Open Button	Click the **Open** button to view the expanded message.
Close Button	Click this button to **Close** the action.
	Note: The checkbox is selected by default, so that only open actions display. Deselect the checkbox to turn off this option, and use it when you need to query closed actions for historical data.

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Processing HR-Training Actions in the WorkFlow Inbox,
Continued

Accessing the Notifications Window

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click <Open> on the Notifications Summary window to display the Notifications window.

</td></tr>
<tr><td>2</td><td>From the Notifications window, you can process the TRF action by clicking <Respond> and displaying the TRF. To view the history of the TRF, click the Routing History Form Icon.</td></tr>
<tr><td></td><td>
<table>
<tr><th>Data Fields and Buttons</th><th>Description/Action</th></tr>
<tr><td>Comment</td><td>You can add additional information in this data field. However, it stays with the request and does not go into history.</td></tr>
<tr><td>References</td><td>This opens the Routing History Form Icon to track the history of the request being processed.</td></tr>
<tr><td>Respond Taskflow Button</td><td>This button opens the TRF.</td></tr>
</table>
</td></tr>
</table>

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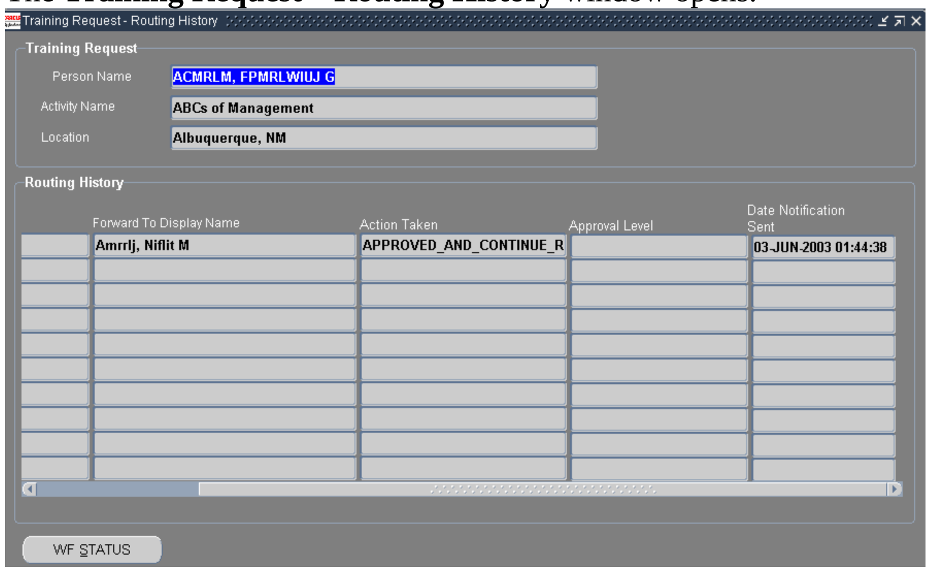
TRF Routing History

Training Request – Routing History

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click the Routing History Form Icon.</td></tr>
<tr><td>2</td><td>The Training Request – Routing History window opens.

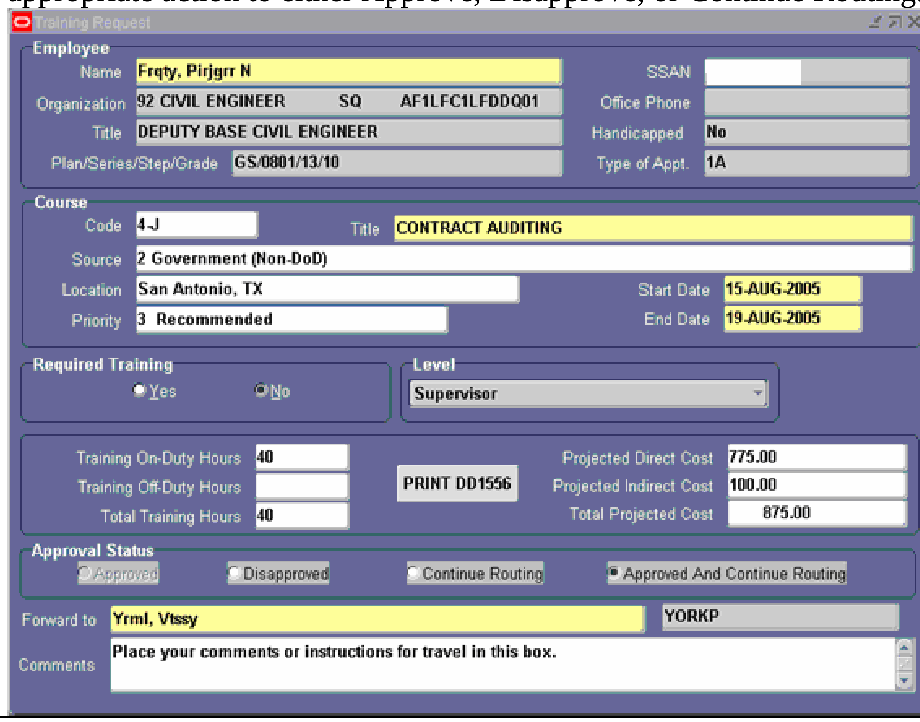


Use the lower scroll bar to view the remaining columns.
<table>
<tr><th>Data Field</th><th>Description/Action</th></tr>
<tr><td>Training Request Forwarded By</td><td>This is the name of Supervisor, Training Monitor, etc., who forwarded the TRF.</td></tr>
<tr><td>Action Taken</td><td>Self-explanatory – matches Approval Status Region of the TRF.</td></tr>
<tr><td>Level</td><td>This is the Level of the person who submitted the TRF (e.g., supervisor).</td></tr>
<tr><td>Forward to Name</td><td>The next person designated to take action.</td></tr>
<tr><td>Date Notification Sent</td><td>Self-explanatory.</td></tr>
</table>
</td></tr>
</table>

Continued on next page

TRF Routing History, Continued

Training Request – Routing History (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Once you have reviewed the columns, exit the window to return to the Notifications window.</td></tr>
<tr><td>4</td><td>Click <Respond> on the Notifications window.</td></tr>
<tr><td>5</td><td>The TRF will open. You will need to review the action then take appropriate action to either Approve, Disapprove, or Continue Routing.

</td></tr>
</table>

Approving or Disapproving the TRF

Approving or Disapproving the TRF

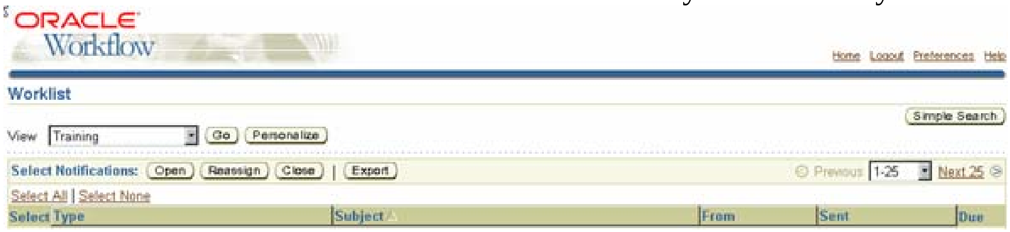
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click the appropriate button, as determined by your role, in the Approval Status Region of the TRF.

Note: See information on Approval Status in Chapter 1 of this module.</td></tr>
<tr><td>2</td><td><table>
<tr><td>If you <u>are</u> the final Approving Official:</td><td>If you are <u>not</u> the final Approving Official:</td></tr>
<tr><td>• Click <Approved> or <Disapproved>.</td><td>• Click <Continue Routing> or <Approved and Continue Routing>.</td></tr>
<tr><td>• Click the Save button on the Toolbar.</td><td>• Use the LOV to select the name to enter in the Forward to data field or type in the name.
• Click the Save button on the Toolbar.</td></tr>
</table>
Note: If you disapprove the request, you will not complete the next step.</td></tr>
<tr><td>3</td><td>Exit the windows.</td></tr>
</table>

Customizing Your Workflow Inbox

Customizing Your Inbox

Click the **Personalize** button to customize folders in your inbox for your use.



Personalize Views will display a list of pre-configured and/or personalized views applicable to 'Worklist" table on the previous screen.

See Also

Module 1, Fundamentals of the DCPDS
Chapter 7, Folders

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